



**Rational Wealth
Solutions**

DECIDING TO RELOCATE IN RETIREMENT TO ENJOY KIDS AND GRANDKIDS.

VALUED CLIENT CASE STUDIES

A retired doctor and his wife had already downsized from the family home to a condo in the city before I met them. Now they came to me with another consideration. Their children now have had kids of their own, and the couple wondered if they could purchase something in the suburbs again to be near the grandkids without wrecking their financial plan.

Working with the client to rediscover what their retirement spending actually looked like now that they had some years of retirement under their belt took some time. I carefully ran them through many “what if” scenarios that worried them – “What if the market has another crash and recession like 2008?”; “What if inflation continues above 4%?”; “What if one of us needs long term care, how will we pay for that?”; etc.

This planning exercise gave them the confidence to make the move. They sold their condo, and using some of their investments, they were able to secure their financing and purchase their forever home near their grandchildren!



Important Disclaimers:

These case studies are provided for educational and illustrative purposes only. They represent specific client scenarios, but they are general in nature. The client circumstances, planning solutions, and results are based on specific facts tied to unique client situations at a specific point in time. They are created with the benefit of hindsight and are meant to provide a general overview of our process, methodology and services, they are not a guarantee of any future results as favorable results cannot be guaranteed even in a similar scenario.

Please understand that forecasts, estimates and projections used in many planning scenarios are inherently speculative as they are based on assumptions which may involve known and unknown risks and uncertainties. Future results may differ materially, compared to what is discussed herein, due to market and economic conditions, client circumstances, and other factors.

No case study is to be interpreted as a testimonial or endorsement from a client, as no client was involved in the creation of this material.

Investing involves risk and the potential to lose principal.

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